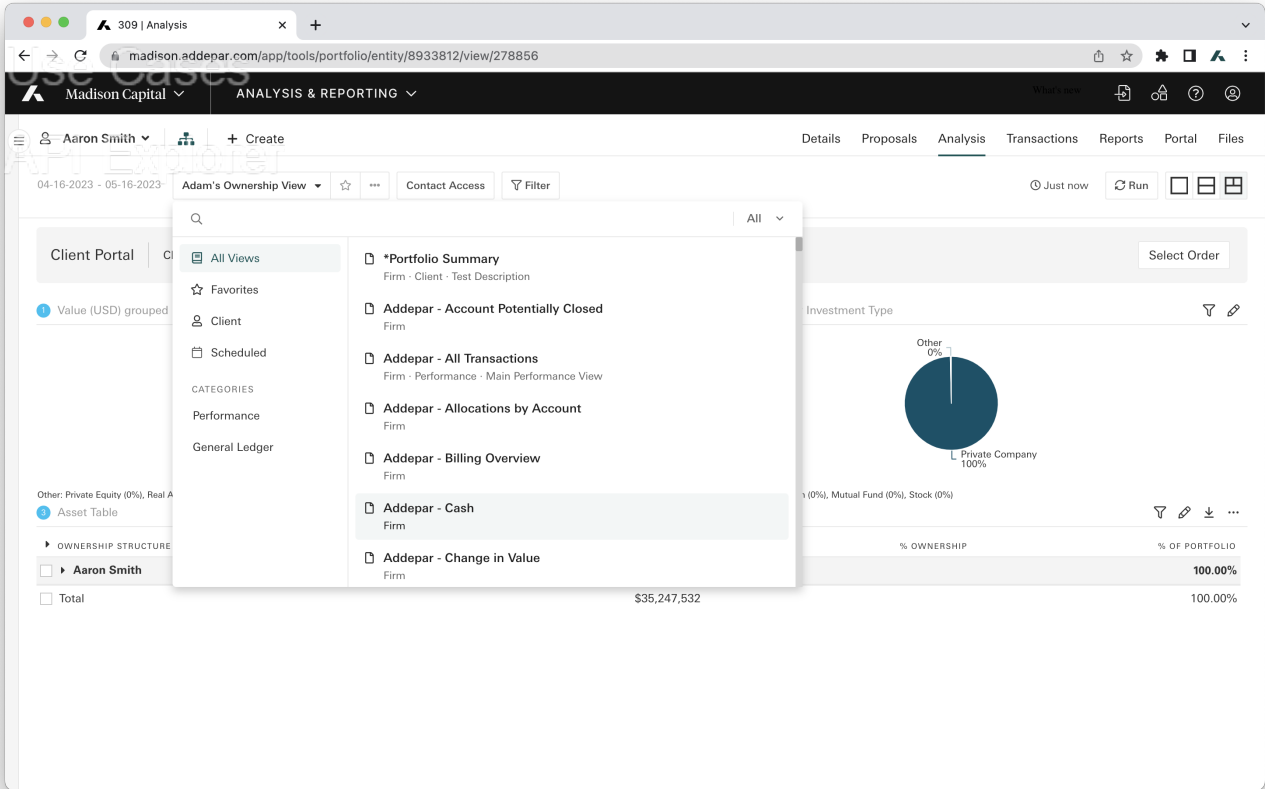


View List

Get a complete list of views for portfolios you have access. Then, easily use a view ID to see view details or get the request body to quickly query the view.

Does



Resource Overview

ATTRIBUTE	DESCRIPTION	EXAMPLE
share_type	The share type of the view. String. Supported values: <ul style="list-style-type: none">PERSONALFIRMTEAMPORTALPORTAL_TEAM	PERSONAL
display_name	Default argument value. Boolean or String.	false
parameters	Returns a request body for the Portfolio Query API. List of objects. See parameters.	[{"key": "time_weighted_return"}]

Get a List of Portfolio Views

Get a complete list of views for portfolios you have access to. Then, use View IDs to quickly see view details or get a portfolio query request body.

GET /v1/portfolio/views

REQUEST	RESPONSE
GET https://examplefirm.addepar.com/api/v1/portfolio/views	

Responses

- 200 OK: Success
- 404 Not Found: User lacks API permission or has not granted the appropriate scope

Get a Portfolio View Query Request Body by ID

Returns a complete request body to quickly query on a portfolio view.

GET /v1/portfolio/views/:id

Example:

REQUEST	RESPONSE
GET https://examplefirm.addepar.com/v1/portfolio/views/:id	

Responses

- 200 OK: Success
- 404 Not Found: User lacks API permission or has not granted the appropriate scope



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